Energy Assistance Center Guide

January 2009

Table of Contents

Energy Assistance Center

Overview

This online tool enables Energy Assistance Agencies to connect with Alliant Energy via the EAC instead of directly contacting the Customer Service Centers.

From the EAC website agencies log into the secure site to view a customer's usage and payment history, enter a promise to pay, view a customer's disconnect history and enter comments on customers' accounts that are viewed by the Customer Service Centers.

The Energy Assistance Center benefits include:

- Timely and cost effective customer service
- No need to contact Customer Service…therefore no time "on hold" waiting for a representative
- Immediate and up-to-date information
- Ability to add notes to the customer utility account which can be viewed by the Alliant Energy Customer Service representatives
- Printable Version option available on all screens makes it easy to get documentation for your records

Getting Started

Overview

Access to the Energy Assistance Center is provided to agencies in Wisconsin and is available at any location with an internet connection.

Some of the Agencies include:

- Energy Assistance
- Local Human Services
- Social Services
- County Fuel Assistance
- Community Action Programs
- General Assistance
- Salvation Army
- Housing Authorities

Features

Use this site to access customer utility accounts:

- View client information:
  - Energy Usage
  - Customer Payment History
  - Customer Arrears
  - Current Bill Due Date and Amount
  - Disconnect Information
- Document the client's utility account with:
  - Dollar amount of grants
  - Funding source of grants
  - Amount and date of any required customer payments
  - Promise to Pay remark is automatically created

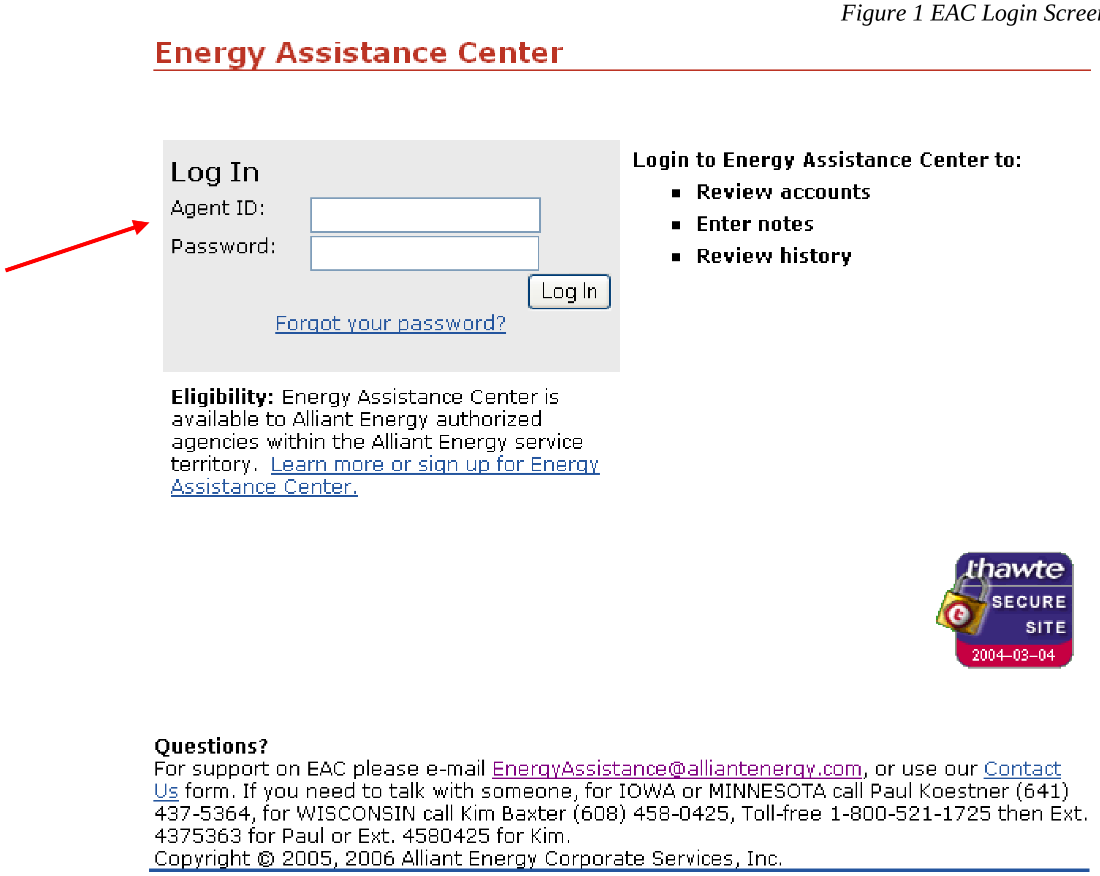
- Develop lists to monitor clients you're working with
  - Use the Agency Desktop feature to view all accounts that agents in your agency are working with and track customer required payments
  - Use the Agent Desktop feature to view only accounts you are working with and track customers required payments
- Provides your Agency with information for the entire LIHEAP Program Year

Log into the EAC Website

1. Use the Energy Assistance Center web page to request access to this site.

   EAC Login Screen with enrollment link.

Figure 1 EAC Login Screen



The Learn More page will display

Energy Assistance Center
Learn More and Sign Up

Energy Assistance Center Overview

The Energy Assistance Center is a website for authorized agencies within the Alliant Energy service territory. Agencies have the ability to review a customer's usage and payment history, as well as note a customer's account for a promise to pay.

Requesting Access

In order to request access, please complete the Contact Us form indicating that you would like access. We will then respond to your request within two business days.

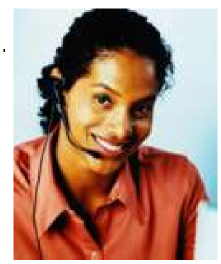
Return to Login

Figure 2 EAC Learn More Screen

2. If you are a new user, click on the Contact Us link and the following screen will display. Use this to submit a request for access to the EAC site.

Energy Assistance Center
Customer Service Center

If you have questions about the Energy Assistance Center, please e-mail us at EnergyAssistance@alliantenergy.com , or use the form below to contact us.



* Indicates required information

Agent ID:

Name:*

E-mail:*

Phone: (Example: 608-123-4567)

Comments/Questions:*

Send Clear

3. The agent ID is set up by the EAC administrator. The administrator will notify the agent with the login ID and temporary password.

4. When an agent logs into the system using the temporary password they will be asked to change the password, confirm the new password, and create a Secret Question and Answer.

Note: The password will be good for 60 days.

Temporary Password Change Screen

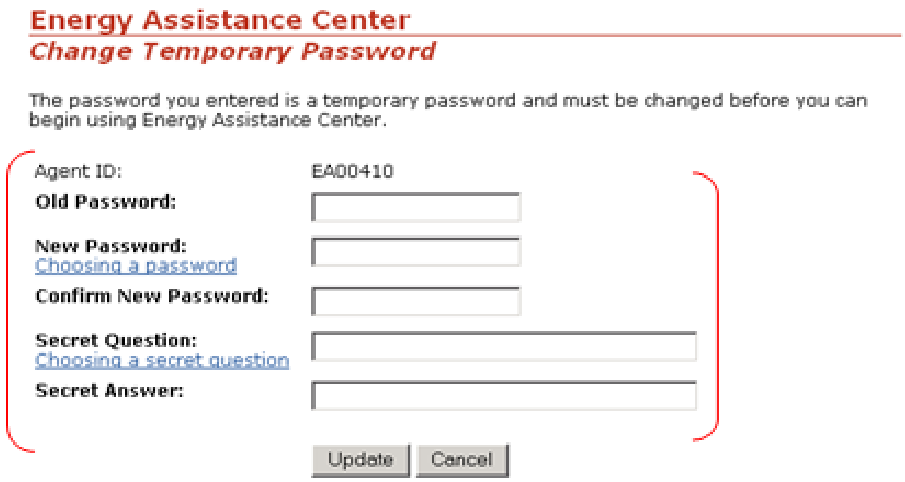
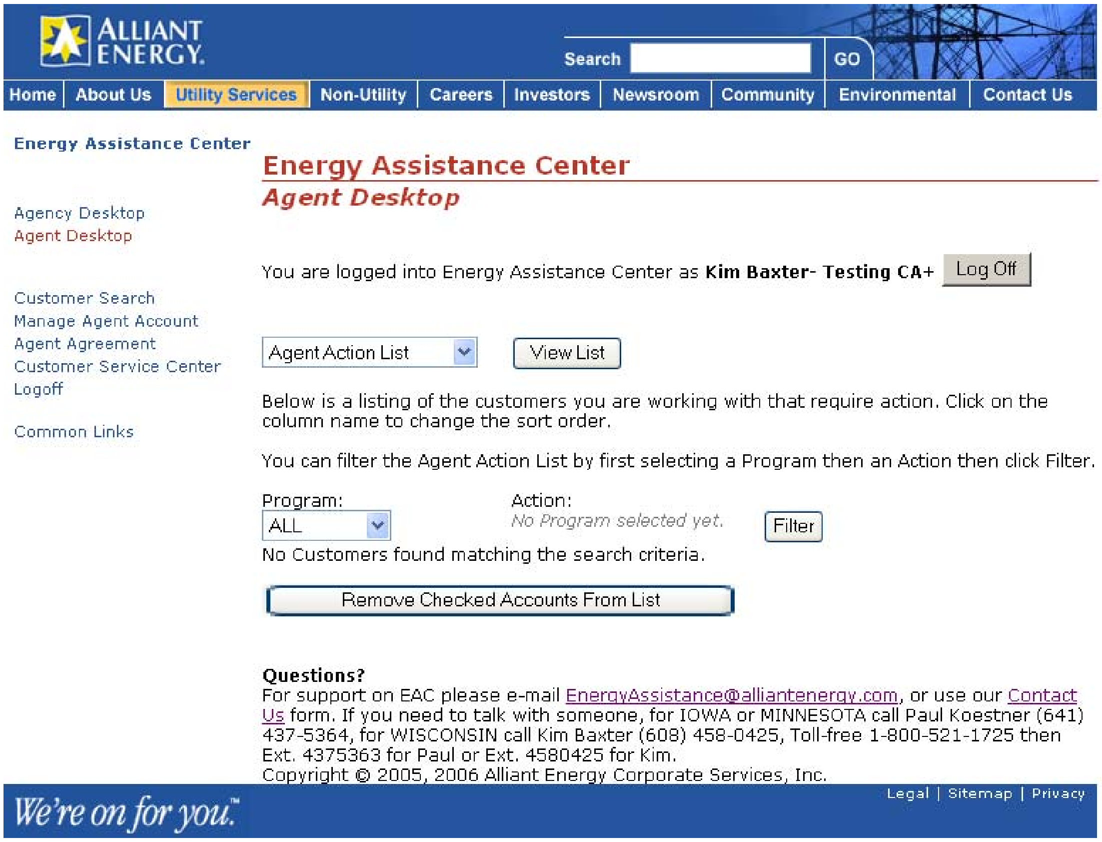


Figure 3 Change Password Screen

Note: The Secret Question and Secret Answer are used if an agent would forget their password.

5. The following screen will display allowing the Agent to search for specific customer accounts, work from existing lists, or use any of the navigation tools on the left side of the page. Initial Agent display screen including navigation links on the left side of the screen.

Figure 4. Initial Agent Display Screen


ALLIANT ENERGY.
Search
GO
Home | About Us | Utility Services | Non-Utility | Careers | Investors | Newsroom | Community | Environmental | Contact Us
Energy Assistance Center
Agency Desktop
Agent Desktop
Customer Search
Manage Agent Account
Agent Agreement
Customer Service Center
Logoff
Common Links
Energy Assistance Center
Agent Desktop
You are logged into Energy Assistance Center as Kim Baxter- Testing CA+
Log Off
Agent Action List
View List
Below is a listing of the customers you are working with that require action. Click on the column name to change the sort order.
You can filter the Agent Action List by first selecting a Program then an Action then click Filter.
Program:
ALL
Action:
No Program selected yet.
Filter
No Customers found matching the search criteria.
Remove Checked Accounts From List
Questions?
For support on EAC please e-mail EnergyAssistance@alliantenergy.com, or use our Contact Us form. If you need to talk with someone, for IOWA or MINNESOTA call Paul Koestner (641) 437-5364, for WISCONSIN call Kim Baxter (608) 458-0425, Toll-free 1-800-521-1725 then Ext. 4375363 for Paul or Ext. 4580425 for Kim.
Copyright © 2005, 2006 Alliant Energy Corporate Services, Inc.
We're on for you.
Legal | Sitemap | Privacy

Searching for a Customer Account

Overview

You can search for customers who are in the Alliant Energy database. You can retrieve any account if you have the account number and first initial of the last name unless the account has been blocked.

If the search locates the correct customer information, the agent needs to complete a Customer Authorization form to ensure the customer has provided legal authorization to the agent to view the account. This authorization is good for all agents under the same parent agency.

Steps

6. On the Customer Search screen enter the Customer Utility Account number and the First Initial of their last name and click on the Search button.

   Example of Customer Search Screen

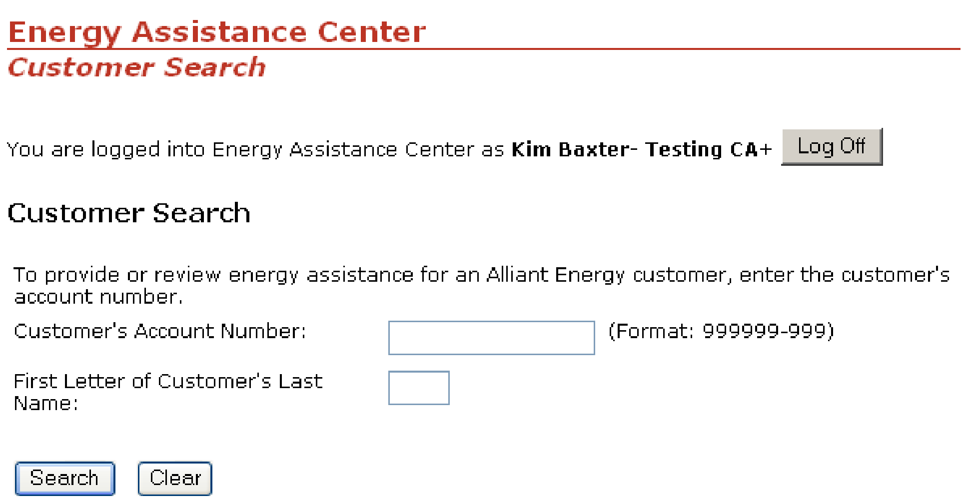


Figure 5 Customer Search Screen

Note: You must enter the complete account number including dashes

Complete an approved Customer Authorization form and keep it in your files.
(See the Appendix for examples.)

Options include:

<u>Wisconsin</u>

- Customer Authorization for Access to Account Information
    - Alliant Energy Form (FM-0405)
    - Signed by the Customer
- Receipt of Verbal Customer Authorization
    - Alliant Energy Form (FM-0407)
    - Signed by an Agency Representative
- State of Wisconsin Energy Assistance Application (LIHEAP)

8. The first time you access a customer account you must indicate the type of authorization you have in your files
9. Verify the customer name and address are for the correct account
10. Click Save

Note: A remark will be added to the customer utility account to record that this agency has authorization to view the customer's information, what type of authorization is on file, and the date it will expire

Customer Authorization

Example of the Customer Authorization Screen

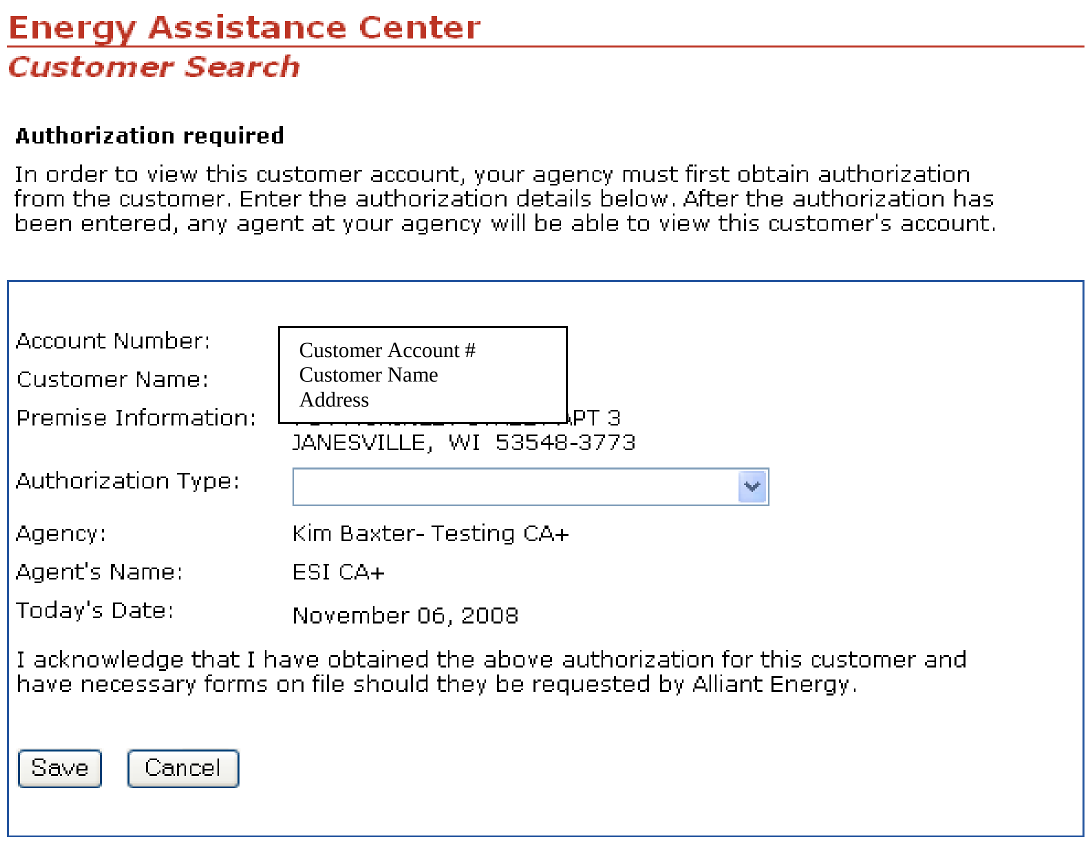


Figure 6. Customer Authorization Screen

Customer Authorization Types include:

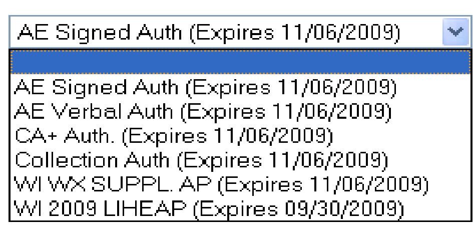


Figure 7. Customer Authorization Options

11. The next time you search for this customer's account you will have an opportunity to change the type of authorization on file.

The Customer Search Result screen appears with a Change hyperlink option.

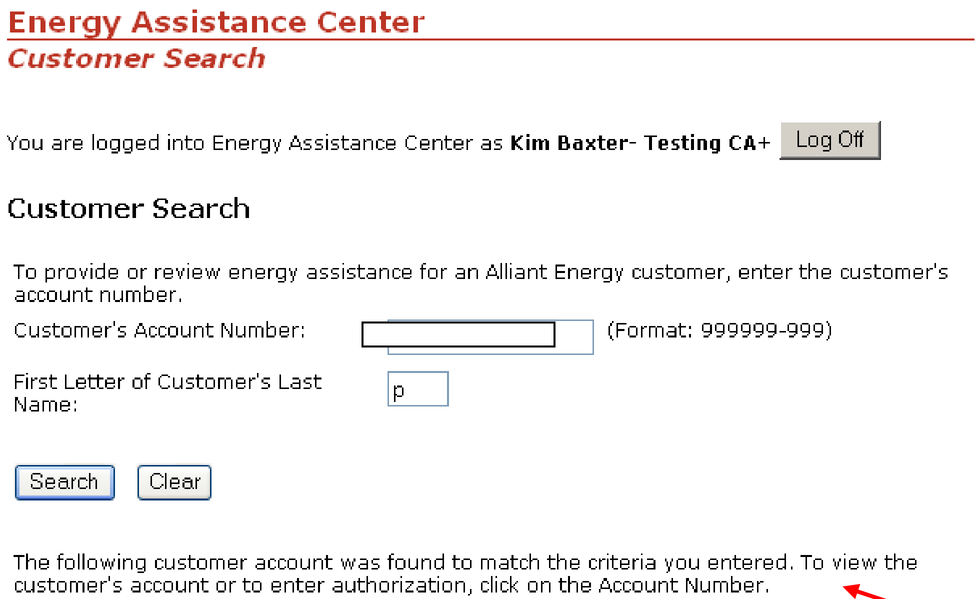


Figure 8. Customer Search Screen

12. If a customer account number changes, you will receive the following Warning message if you try to log in using the "old" account number.

Figure 9. Warning Message - Account Number Changed

Viewing Customer Account Information

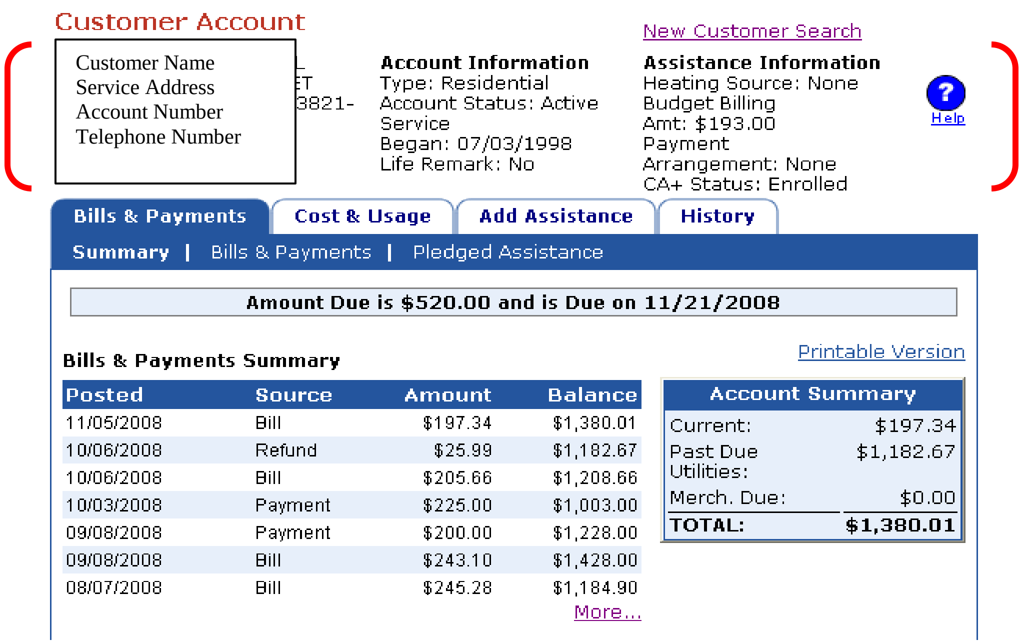


Figure 10. Customer Information Screen

Indicative Information

13. The top portion of the screen includes basic information about the customer's account. The information will vary depending on the specific customer.

Customer Information includes:

- Name – Customer's First and Last Name
- Address – Property address where Alliant Energy is providing utility service
- Account Number – Customer's Alliant Energy account number
- Phone 1 – Contact phone number on record with Alliant Energy

Account Information includes:

- Type – Type of utility customer…Residential, Farm, Commercial
- Account Status – Status of the customer's utility account:
  - Active- Open account, currently being billed
  - Inactive- Account is closed
- Service Began – Date customer started their utility service at this address with Alliant Energy
- Service End – Date customer ended utility service at this address with Alliant Energy (only displayed when applicable)

Assistance Information includes:

Payment Arrangement: A payment plan setup with the customer to help the customer pay past due amounts (arrears) and avoid being disconnected. A value other than 'None' denotes that the customer is currently on a payment plan.

- Arrangement Amount – The customer's current contracted budget amount which includes catch-up payments to clear previous past due amounts.
- Est. Budget – Estimated monthly amount to cover future utility bills under the Budget Billing program
- CA+ Status: A payment plan setup with the customer to help the customer pay past due amounts (arrears) and avoid being disconnected. A value other than 'None' denotes that the customer is currently on a payment plan.

14. The Help icon will take you to a screen that describes each of the display fields in this section

Bills & Payments Tab

Amount Due is $520.00 and is Due on 11/21/2008

Bills & Payments Summary

Printable Version

Posted	Source	Amount	Balance
11/05/2008	Bill	$197.34	$1,380.01
10/06/2008	Refund	$25.99	$1,182.67
10/06/2008	Bill	$205.66	$1,208.66
10/03/2008	Payment	$225.00	$1,003.00
09/08/2008	Payment	$200.00	$1,228.00
09/08/2008	Bill	$243.10	$1,428.00
08/07/2008	Bill	$245.28	$1,184.90

More...

Account Summary	
Current:	$197.34
Past Due Utilities:	$1,182.67
Merch. Due:	$0.00
TOTAL:	**$1,380.01**

Pledged Assistance History

Date	Amount	Source*	Agency	Agent
10/03/2008		CA+ (24) $260/Mo. Enrolled	ESI CA+	Lisa Yang
10/03/2008	$225.00	Electronic payment today from customer	ESI CA+	Lisa Yang

More...

* CA+ entries reflect what the customer will be paying monthly. It does not reflect any 'cash' assistance given to the customer/Alliant Energy.
CB = Current Bill

Figure 11. Bills and Payments Tab

15. This tab includes information about the current amount owed and due date for the customer's next bill, a warning section, a summary section of the three most recent bills and payments at this location, a record of pledged assistance for the most recent three months, and the customer's current Alliant Energy mailing address.

Note: There is a Printable Version hyperlink available on this screen if you want to keep a printed record for your customer file.

Warning message:

16. **Amount Due is $474.00 and is Due on 03/24/2008**
--> Warning: Disconnect Notice Exists on this Account for 03/25/2008 <--

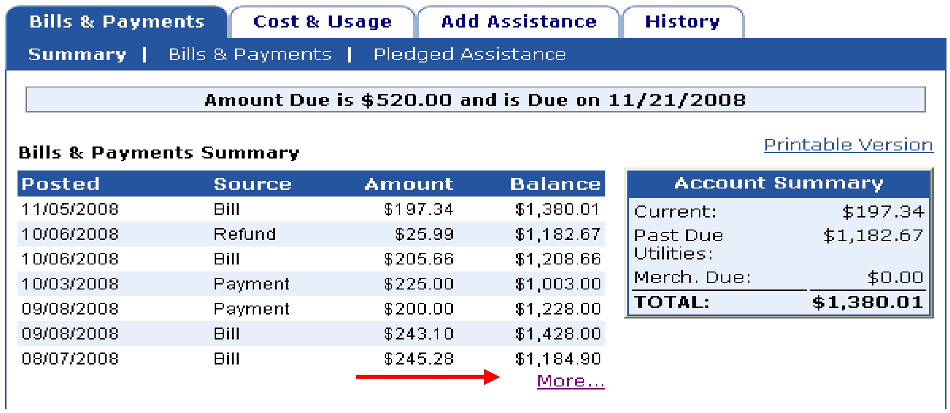
- A warning message will appear (see above picture) if there is a service change request, disconnect notice, pending disconnect or service has been disconnected.
- See list of warning messages on page 16.

Possible Messages include:

Message Displayed	Description
→Warning: Disconnect Notice exists on this account for MM/DD/YYYY←	Customer has received a Disconnect Notice and may be disconnected on or after the date listed. Pledges made using Add Assistance will be seen by Alliant Energy before a Disconnect is scheduled
→Warning: Customers Electric & Gas Service was disconnected←	Gas and Electric meters at this address are currently disconnected
→Warning: Customers Electric Service was disconnected←	Customers Electric service is currently disconnected
→Warning: Customers Gas Service was disconnected←	Customers Gas Service is currently disconnected
→ Warning: No disconnected meters are found←	Customer's Service was recently reconnected. Service is on and paperwork is being finalized by the utility
→ Warning: Turn-on or Turn-Off order exists on the account ←	Customer has requested a Turn-Off for this account or a new service Turn-On has been requested by a new tenant or the landlord.
→Warning: Disconnect PENDING on this account←	Disconnection Order has been issued, customer may still be disconnected. Need to Contact Alliant Energy to be sure it's cancelled if you're setting up an arrangement with the customer.

17. If you select the More… link in the Bills and Payments Summary section,
18. you will be able to view 18 months of billing and payment details if it is available (assuming they've been a customer at this location for that long.)
19. If you select the More… link in the Pledged Assistance History section, you will see a listing of assistance pledged during the past 24 months.

    For example…



Posted	Source	Amount	Balance
11/05/2008	Bill	$197.34	$1,380.01
10/06/2008	Refund	$25.99	$1,182.67
10/06/2008	Bill	$205.66	$1,208.66
10/03/2008	Payment	$225.00	$1,003.00
09/08/2008	Payment	$200.00	$1,228.00
09/08/2008	Bill	$243.10	$1,428.00
08/07/2008	Bill	$245.28	$1,184.90

Account Summary	
Current:	$197.34
Past Due Utilities:	$1,182.67
Merch. Due:	$0.00
TOTAL:	**$1,380.01**

Figure 12. Expanded Pledge Assistance History Screen

Cost & Usage Tab

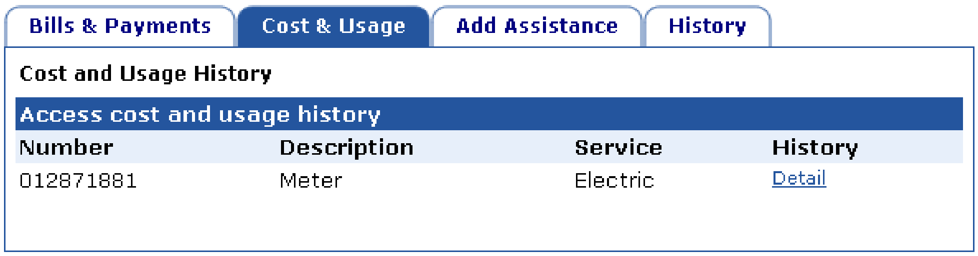


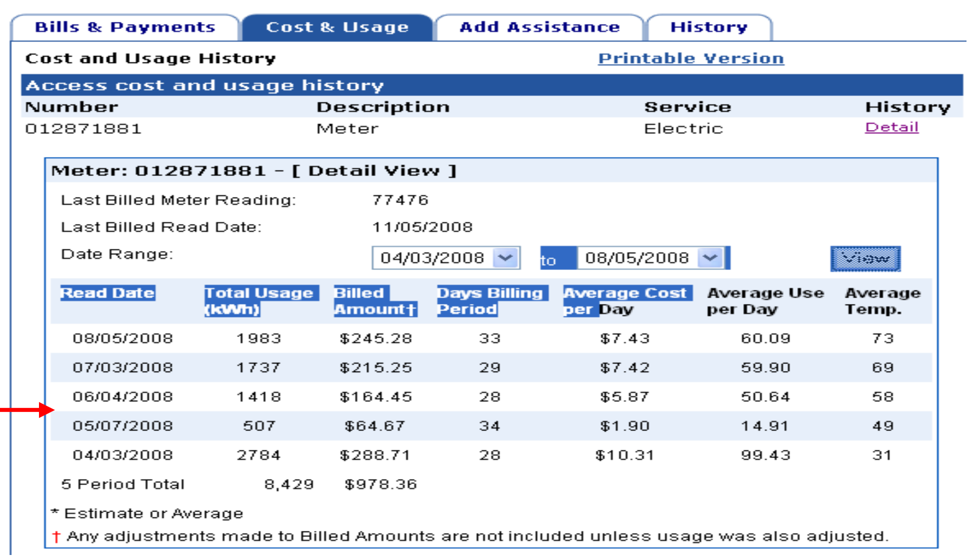
Figure 13. Cost & Usage Tab

20. The Cost and Usage tab allows you to view meters associated with this account location. When you select the Detail link you will see more specific information about the selected meter.

Note: If a meter has been disconnected it will not appear on this screen.

21. The Detail link will display 18 months of information. However, you can change the months that are displayed by using the "Date Range" drop-down boxes and then click the "View" button to update.

The Cost & Usage Detail Screen appears including a summary total for the months displayed.



Read Date	Total Usage (kWh)	Billed Amount†	Days Billing Period	Average Cost per Day	Average Use per Day	Average Temp.
08/05/2008	1983	$245.28	33	$7.43	60.09	73
07/03/2008	1737	$215.25	29	$7.42	59.90	69
06/04/2008	1418	$164.45	28	$5.87	50.64	58
05/07/2008	507	$64.67	34	$1.90	14.91	49
04/03/2008	2784	$288.71	28	$10.31	99.43	31
5 Period Total	8,429	$978.36				

* Estimate or Average
† Any adjustments made to Billed Amounts are not included unless usage was also adjusted.

Figure 14. Cost & Usage Detail Screen

Adding Assistance

Overview

This tab allows an agent to provide the customer with assistance in paying their Alliant Energy bill. An agent can provide assistance with no expectations of the customer, or you can require the customer to pay (co-pay) an amount by a certain date. If the customer does not meet the conditions then no assistance is applied.

Figure 15. Add Assistance Screen

1. If the customer has received assistance within the last week or is participating in other EAC programs, the details are displayed above the "Assistance Information" bar. With this information an agent can better determine the needs of the customer. If there is a warning message (see picture on page 20) you may still enter multiple grants. The warning is to protect against duplicate enteries.

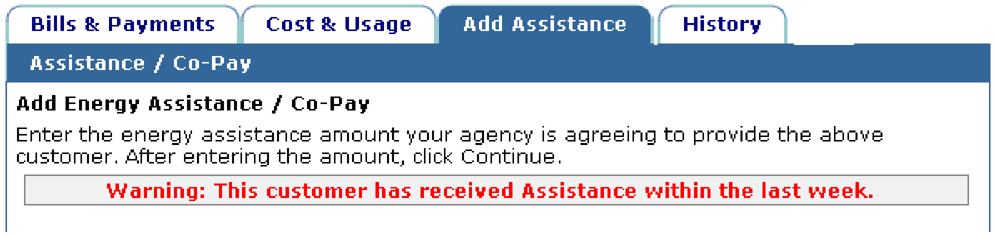
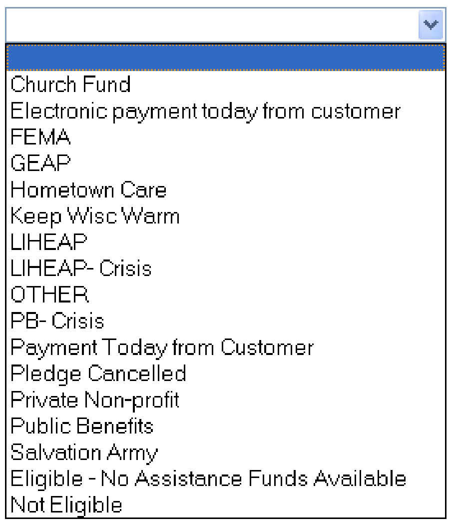


Figure 16. Recent Assistance Alert

Add Assistance Only:

2. Enter the Assistance amount
   - Enter the Source of Assistance
     - Source of Assistance Choices include:



   - Select "No" on the "Customer Payment Requirements" field
   - Click Continue

The Energy Assistance Review Screen appears.

Figure 17. Energy Assistance Review Screen

3. The Energy Assistance Review screen allows the agent the opportunity to take several actions.
   - Change the information by selecting one of the Change links. This will take you back to the previous page with the information still in the fields.
   - Cancel the transaction by selecting the Cancel button. This will take you back to the previous page with the fields blank.
   - Complete the transaction by selecting the Add Assistance button.
4. The agent will receive a final screen confirming the "Add Assistance" transaction. You can use the Printable Version link to obtain a printed copy.

Note: If the customer has a disconnected meter or a disconnect notice a warning message is displayed. The funds being provided will not stop a disconnection or cause service to be reconnected. Contact Alliant Energy to handle these situations.

5. This transaction will generate a note on the customer utility account with the transaction details. The customer will also be added to the Agent Desktop list and the Agency Desktop list. However the account will not display on these lists until after nightly processing.

Add Assistance with a Co-Pay Requirement

6. To add assistance with a co-pay requirement (see *Figure 15*)
   - Enter the Amount of assistance
   - Enter the Source of Assistance
   - Answer "Yes" in the "Customer Payment Requirements" field

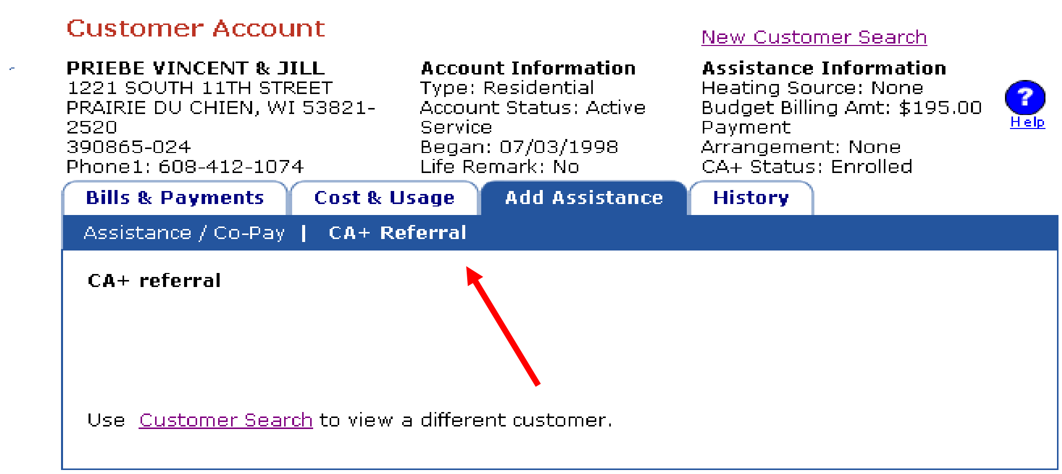
- Enter the Amount of the required payment
- Enter the Due Date of the customer payment

Note: The "Due Date" for a customer's payment cannot go beyond 30 Add Assistance days into the future or past the disconnect date if there is one.

- Click Continue
- Repeat Steps 3-4.

CA+ Referral

1. Select the "Add Assistance" tab, and then select the "CA+ Referral" tab to refer the customer to CA+.



Using the History Tab

Overview

This tab allows an agent to review the customer prior disconnect history with Alliant Energy and review or enter customer remarks. On the menu bar there are two options for the type of history you want to view…Credit History or Customer Remarks.

You will see 12 months of history. The code definitions are listed on the bottom.

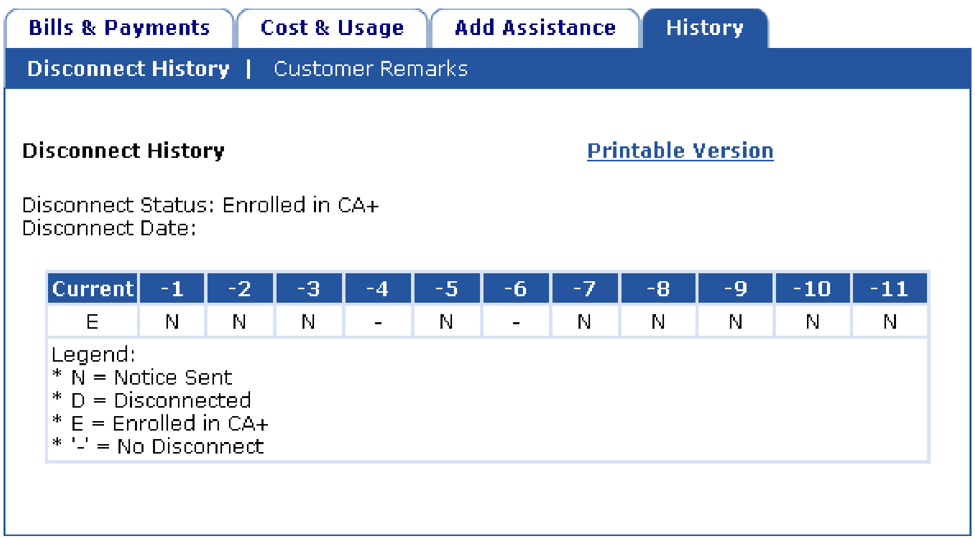


Figure 21. Customer Credit History Screen

The Credit History information provides a snapshot of the information Alliant Energy uses to determine credit worthiness of a customer. It also identifies if they have been disconnected for non-payment within the past 12 months.

7. Click on Customer Remarks on the menu bar to view or print any customer remarks

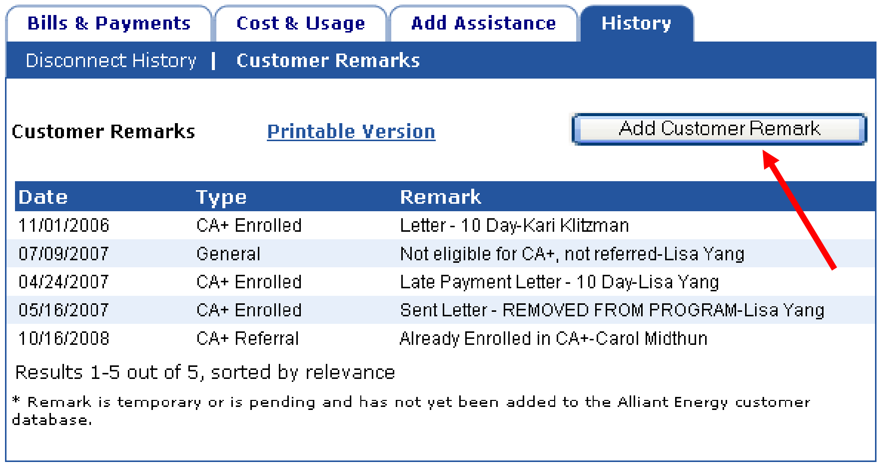
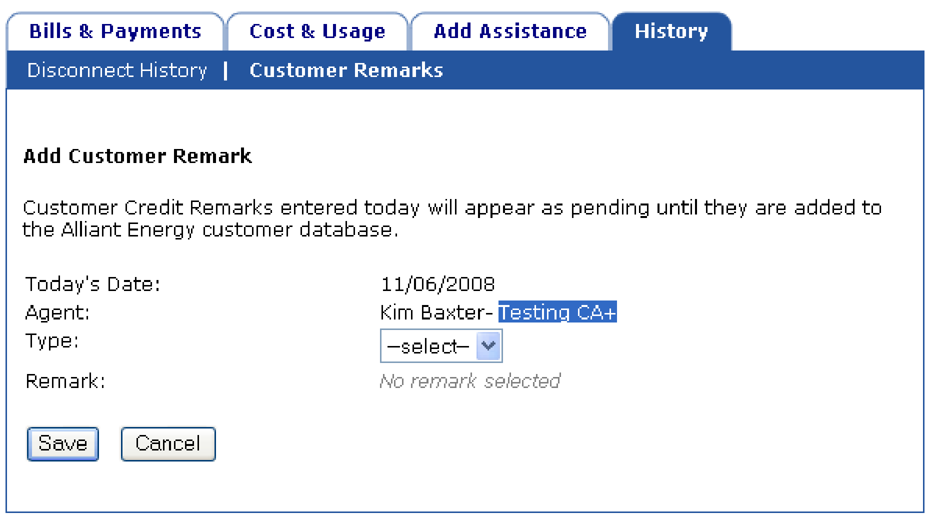


Figure 22. Customer Remarks History Screen

8. To add a note click on the Add Customer Remark button

The Add Customer Remark screen appears.

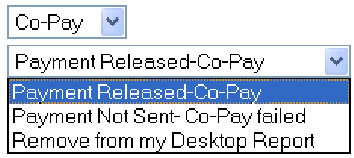
Figure 23. Add Customer Remark Screen



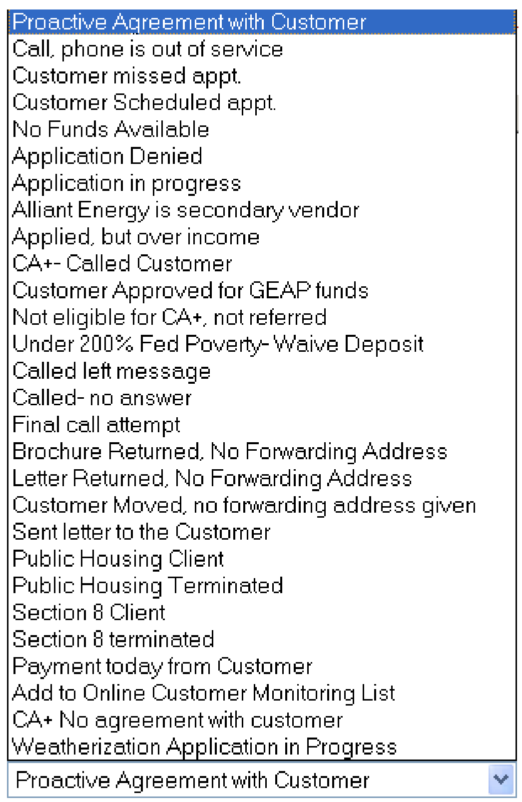
8.

8. Depending on the Type of remark you select, select the most appropriate pre-formatted remark message. Some remarks will also create a note on the customer's utility account.

    - Co-Pay remarks include:



    - General remarks include:



9. Click on Save to complete this step.

Using the Agent and Agency Desktop

Overview

The Agent Desktop is a core screen that allows an agent to manage the accounts they are working with. Accounts the agency has enrolled in a program, done an Add Assistance Payment on, or added a Customer Remark will appear on the Desktop reports. The Agency Desktop allows an agent to view all accounts that other agents in their agency have on their desktops. You can monitor how clients you or your agencies have been working with are doing as well as follow-up on co-payment agreements.

Agency Desktop= Reports of customers everyone set-up under the agency is working with

Agent Desktop= Reports of just the accounts you are working with

Agent Action List

1. Accounts where the agent has entered Add Assistance- Co-pays will appear on this list. This is the first screen you will see when logging into the EAC tool.

   Because these programs require an agent's action during the course of the program, this Action List provides easy access to the customer records.

   Use the left navigation bar to select the Agent Desktop

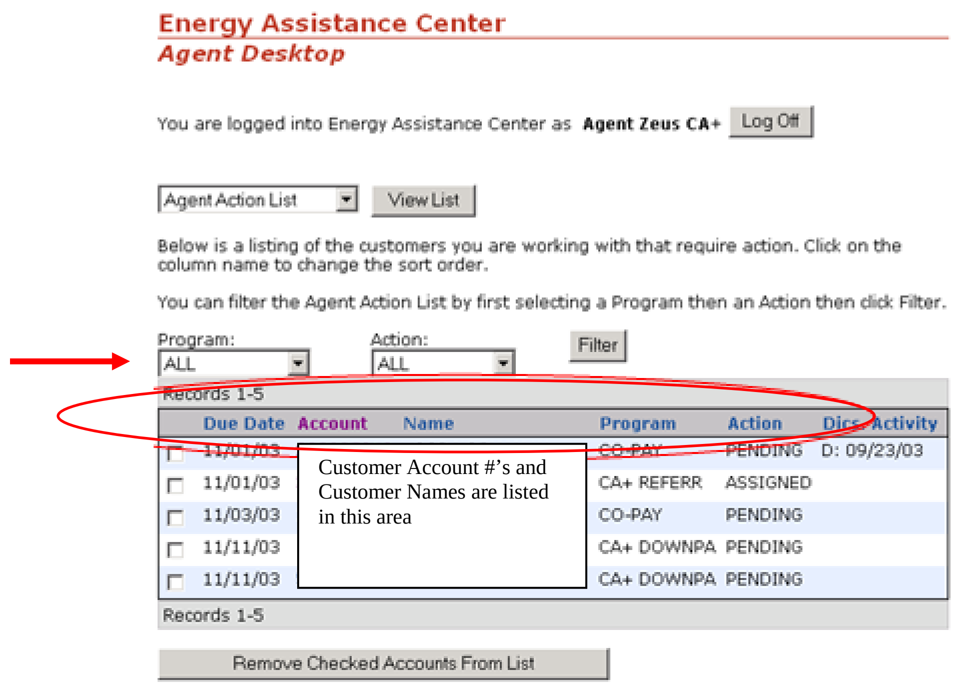


Figure 24. Agent Desktop Screen

2. The customer names can be sorted by clicking on the heading names…Due Date, Account, Name, Program, Action, or Disc Activity.

3. You can also use the Program filter box to focus on certain groups of customers. You can filter by program to view:

    - All Programs
    - General
    - Co-Pay

    You can filter by action to view accounts for:

    - General-Follow-Up
    - Co-Pay-Defaulted
    - Co-Pay-Received
    - Co-Pay-Pending

4. If you check the box beside the customer's name and click on the Remove Checked Accounts From List button the account will "snooze" or be removed from the agent's action list for one day. It will reappear the next morning unless another action has taken place to permanently remove the account.

Customer Activity List

5. All accounts an agent has worked on but require no action will be listed on the customer Activity List.

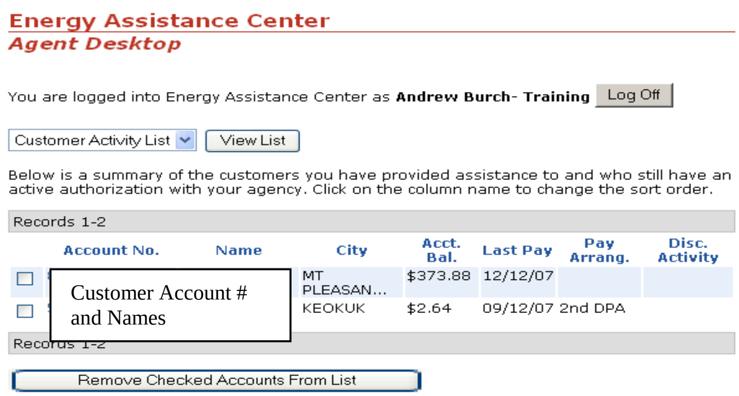


Figure 25. Agent Desktop-Customer Activity List

6. This list can be sorted by any title on the heading bar.

7. You can also check the box on the left and select the 

button to "snooze" the accounts (see Step 29).

Agency Action List

8. Accounts where any agent within the agency has made an Add Assistance pledge on or Made a Customer remark will appear on this Action List. The Agency Action List allows an agent to look at all accounts that are on an Action List for all agents in their agency. Use the left navigation panel to access the Agency Desktop List.

The Agency Desktop list of accounts appears.

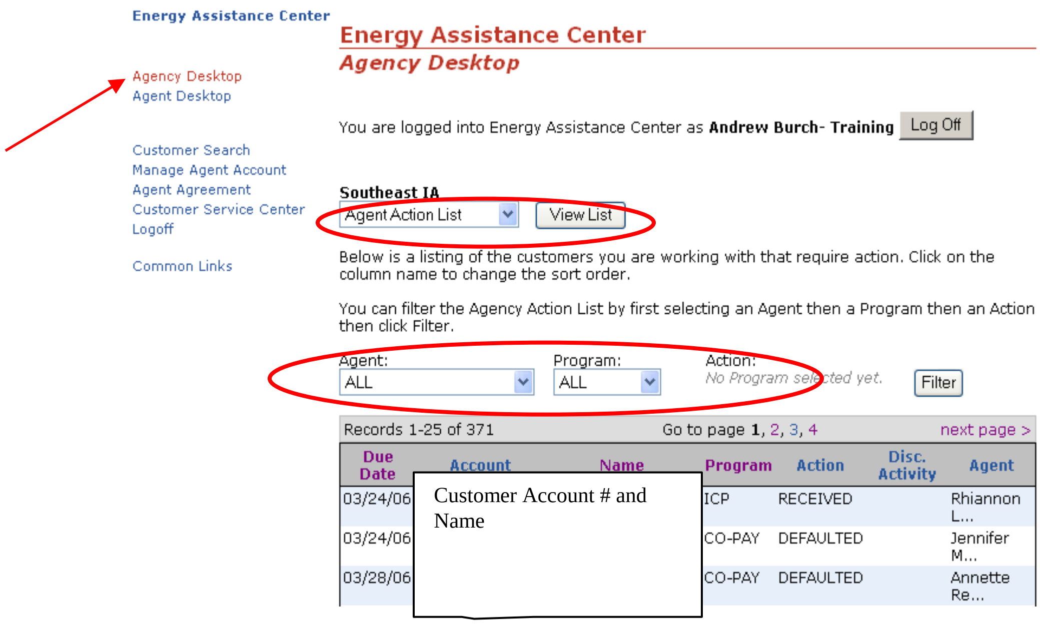


Figure 26. Agency Desktop Screen

9. This list can be filtered to look at customers on Agent Action Lists or to look at all customers who have received assistance through this agency by using the Customer Activity List. In addition you can filter the list by a particular Agent, Program, or Action.

Customer Service Center

Overview

This option displays a web form to email comments or questions to the EAC Alliant Energy contact.

The Customer Service Center contact screen appears.

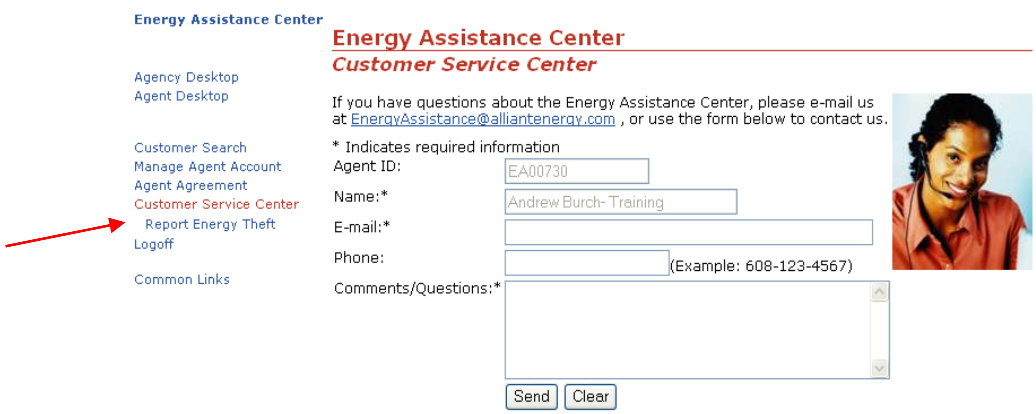


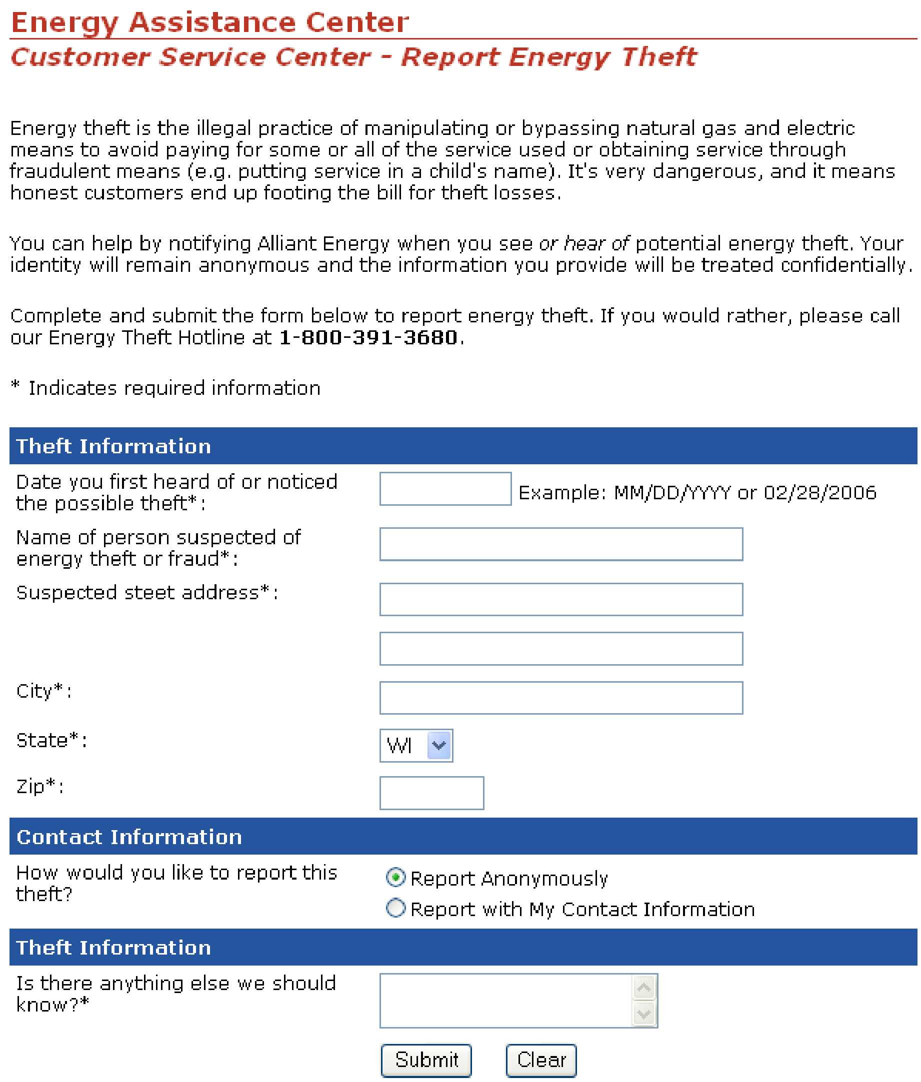
Figure 27. Customer Service Center Web Form

1. Use the left navigation panel to select Customer Service Center.
2. Your Agent ID and Name are pre-populated. Enter your e-mail address, a contact phone number, and your Comments/Questions.
3. Click Send to forward this form.

Report Energy Theft

4. If an agent wants to report an Energy Theft you can select Report Energy Theft under Customer Service Center in the left navigation panel. This will display a web form that you can submit either with your contact information or anonymously.
5. Click Submit to send the form to Alliant Energy.

The Report Energy Theft page appears.



Energy Assistance Center

Customer Service Center - Report Energy Theft

Energy theft is the illegal practice of manipulating or bypassing natural gas and electric means to avoid paying for some or all of the service used or obtaining service through fraudulent means (e.g. putting service in a child's name). It's very dangerous, and it means honest customers end up footing the bill for theft losses.

You can help by notifying Alliant Energy when you see *or hear of* potential energy theft. Your identity will remain anonymous and the information you provide will be treated confidentially.

Complete and submit the form below to report energy theft. If you would rather, please call our Energy Theft Hotline at **1-800-391-3680**.

* Indicates required information

Theft Information

Date you first heard of or noticed the possible theft*: Example: MM/DD/YYYY or 02/28/2006

Name of person suspected of energy theft or fraud*:

Suspected steet address*:

City*:

State*: WI

Zip*:

Contact Information

How would you like to report this theft? Report Anonymously / Report with My Contact Information

Theft Information

Is there anything else we should know?*

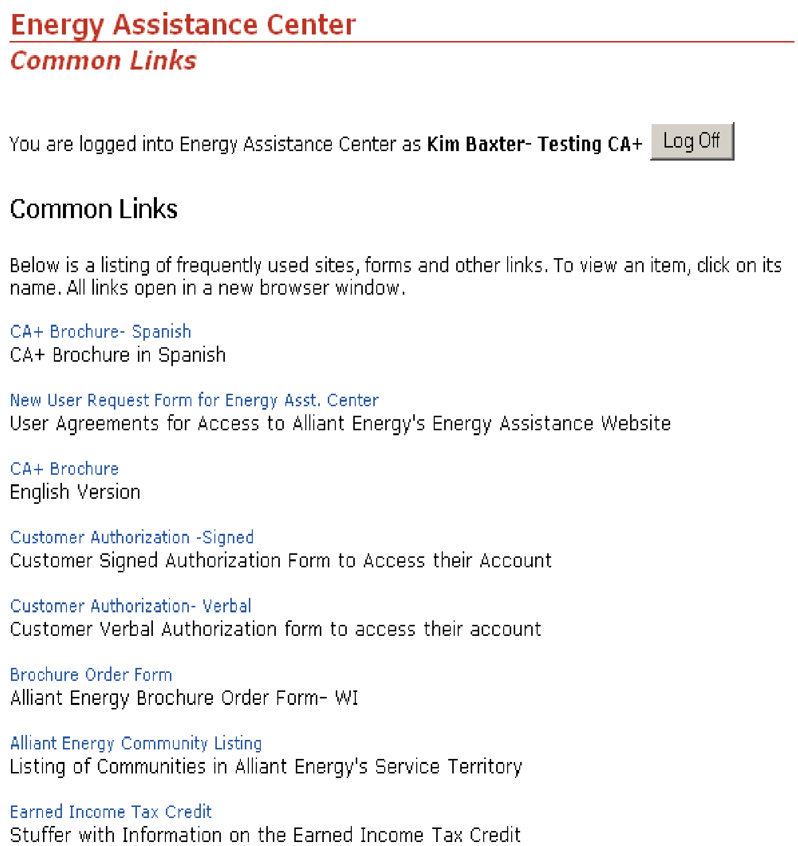
Submit Clear

Figure 28. Report Energy Theft Web Form

Common Links

Overview

This resource page lists a variety of web links that would potentially be useful to an agent or when working with a client. The links are set by the EAC administrator.



Energy Assistance Center

Common Links

You are logged into Energy Assistance Center as **Kim Baxter- Testing CA+** Log Off

Common Links

Below is a listing of frequently used sites, forms and other links. To view an item, click on its name. All links open in a new browser window.

CA+ Brochure- Spanish
CA+ Brochure in Spanish

New User Request Form for Energy Asst. Center
User Agreements for Access to Alliant Energy's Energy Assistance Website

CA+ Brochure
English Version

Customer Authorization -Signed
Customer Signed Authorization Form to Access their Account

Customer Authorization- Verbal
Customer Verbal Authorization form to access their account

Brochure Order Form
Alliant Energy Brochure Order Form- WI

Alliant Energy Community Listing
Listing of Communities in Alliant Energy's Service Territory

Earned Income Tax Credit
Stuffer with Information on the Earned Income Tax Credit

Figure 29. Common Links Page

Helpful links found on this tab include:

View Alliant Energy Cities and Towns

1. An alphabetical list of all communities in the Alliant Energy service territory and the type of utility we provide (electricity or natural gas)

Brochure Order Form

2. An order form to request quantities of Program, Informative, or Agency Staff Brochures

PROGRAM BROCHURES	
	DESCRIPTION
	Taking Control of Your Energy Bill (English); 71-1297
	Taking Control of Your Energy Bill (Spanish); 71-1279
	Hometown Care Energy Fund (English); 71-1229
	Hometown Care Energy Fund (Spanish); 71-1287
	Heating, Cooling and Comfort Measures Rebates; 71-1078
INFORMATIVE BROCHURES	
	Be An Alliant Energy Kid; 71-1168
	101 Ways to Save Energy; 71-0777
	Heating Your Home; 71-0675
	Weatherizing Your Home; 71-0668
	Alliant Energy Welcome Book (English); 71-0988
	Alliant Energy Welcome Book (Spanish); 71-1267
	Appliance Operating Costs; 71-0943
	Your Budget Billing Utility Bill Explained; 71-1280
AGENCY STAFF BROCHURES	
	Customer Assistance Overview Guide; 110680
	Customer Assistance Agency Handbook; 108807
	Energy Assistance Center Overview Guide; 109560

Copy of this User Manual

3. An on-line copy of this user guide

New User Request Form

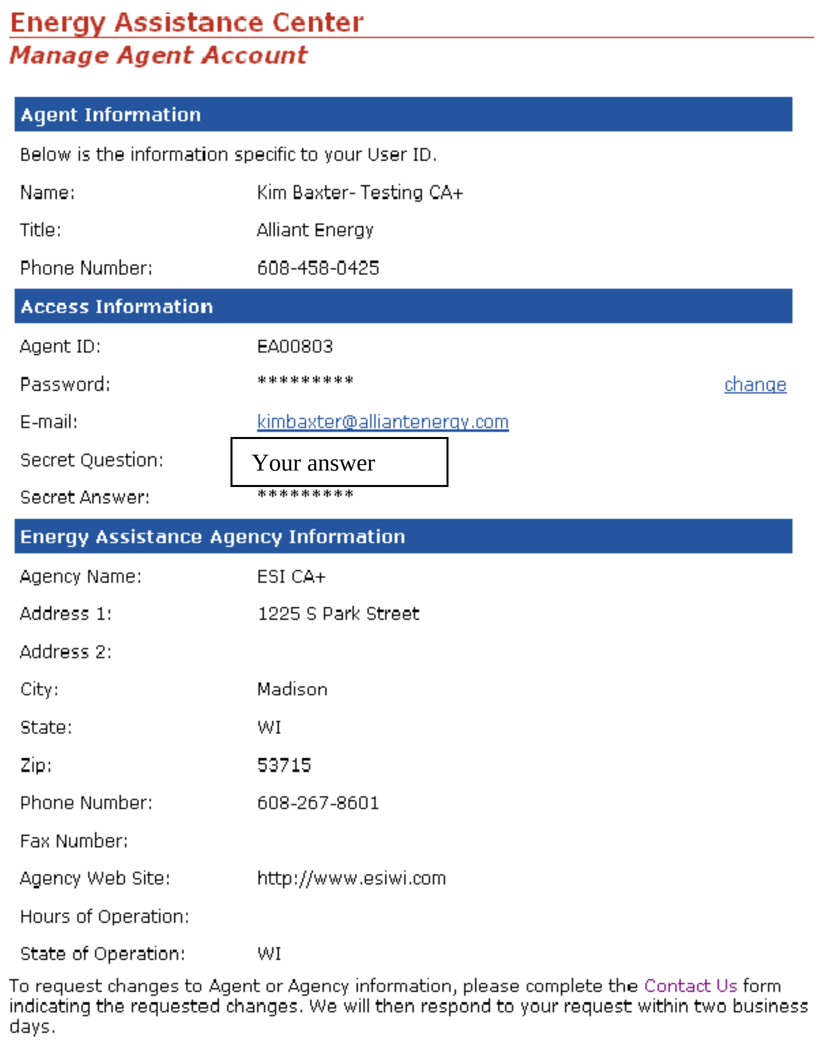
4. The form used to request access for a new employee…FM-0403-A. A copy of this form is in the Appendix.

Manage Agent Account

Overview

This option allows an agent to view information about their Agent ID and change their password.

Navigate to this screen by using the Manage Agent Account link in the left navigation.



Energy Assistance Center

Manage Agent Account

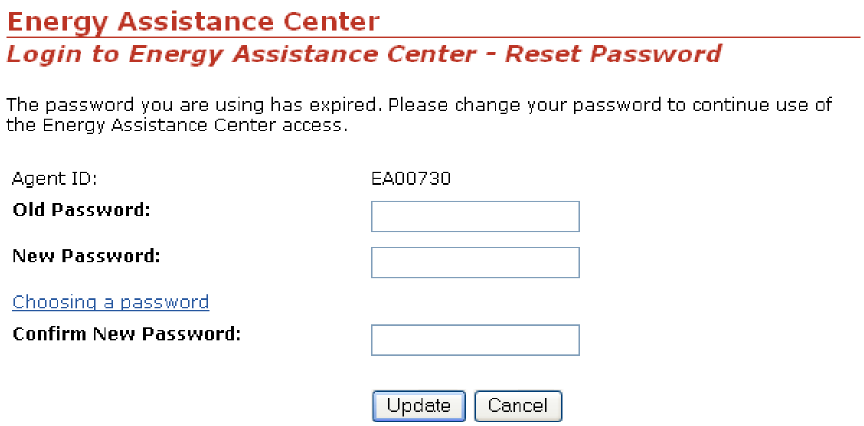
Agent Information	
Below is the information specific to your User ID.	
Name:	Kim Baxter- Testing CA+
Title:	Alliant Energy
Phone Number:	608-458-0425
Access Information	
Agent ID:	EA00803
Password:	********* change
E-mail:	kimbaxter@alliantenergy.com
Secret Question:	Your answer
Secret Answer:	*********
Energy Assistance Agency Information	
Agency Name:	ESI CA+
Address 1:	1225 S Park Street
Address 2:	
City:	Madison
State:	WI
Zip:	53715
Phone Number:	608-267-8601
Fax Number:	
Agency Web Site:	http://www.esiwi.com
Hours of Operation:	
State of Operation:	WI

To request changes to Agent or Agency information, please complete the Contact Us form indicating the requested changes. We will then respond to your request within two business days.

Figure 30. Manage Agent Account Screen

1. Use this screen to review information specific to your Agent ID.
2. If you want to change your password, use the change hyperlink in that section.

   The Reset Password Page appears.


Energy Assistance Center
Login to Energy Assistance Center - Reset Password

The password you are using has expired. Please change your password to continue use of the Energy Assistance Center access.

Agent ID: EA00730
Old Password:
New Password:
Choosing a password
Confirm New Password:

Update Cancel

Figure 31. EAC Reset Password Screen

- Enter your old (current) password
- Enter a new password
  - It must be between 6 and 15 characters.
  - It can't have any spaces.
  - The only acceptable punctuation or special characters are period, hyphen, underscore, apostrophe, and at sign (.-_'@).
- Type the new password again to confirm
- Click Update

3. If any other information needs to be changed, use the contact information links at the bottom of the screen.

Agent Agreement

4. Overview

This section allows you to read the agreement you authorized when you originally applied to use the Energy Assistance Center.

The Agent Agreement appears.

Energy Assistance Center

Agent Agreement

I am an Energy Assistance Agency Agent within the Alliant Energy service territory authorized to issue energy assistance to Alliant Energy customers. I will view only accounts I am authorized to view. I will use this for only official energy assistance purposes in accordance with the Agency Agreement . I am aware that my usage may be monitored to ensure compliance with Alliant Energy's legal and privacy polices.

Figure 32. EAC Agent Agreement Screen

1. Use the left navigation panel to view this screen and click on the Agent Agreement link.

Troubleshooting

If you have a problem logging into the Energy Assistance Center site, it may be because you have mistyped your Agent ID or Password or because your Password has expired.

Note: Passwords expire every 60 days.

If that is the case, you will receive this error message:

Validation Error: You must correct the following error(s) before proceeding:

- The Agent ID was not found or the password may be incorrect. Please retype either the Agent ID or password. You can also click on the Forgot Password link or contact Alliant Energy.

Note: Once you receive a login error message you must enter your Agent ID using upper case letters e.g. EA00999

To protect the customer's information, the sessions will time-out after about 15 minutes of inactivity. You will need to log back in with your user ID and password.

If that is the case you will receive this message:

Validation Error: You must correct the following error(s) before proceeding:

- You were logged off the Energy Assistance Center application because of inactivity. Please log back into Energy Assistance Center.

Energy Assistance Center

Forgot Password

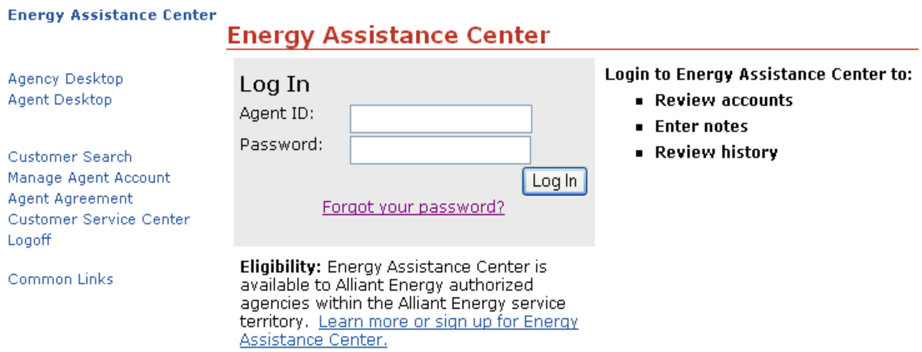


Figure 33. EAC Initial Login Screen

1. If you forget your EAC password use the Forgot your password? link on the initial login screen.

The Forgot Password screen appears.

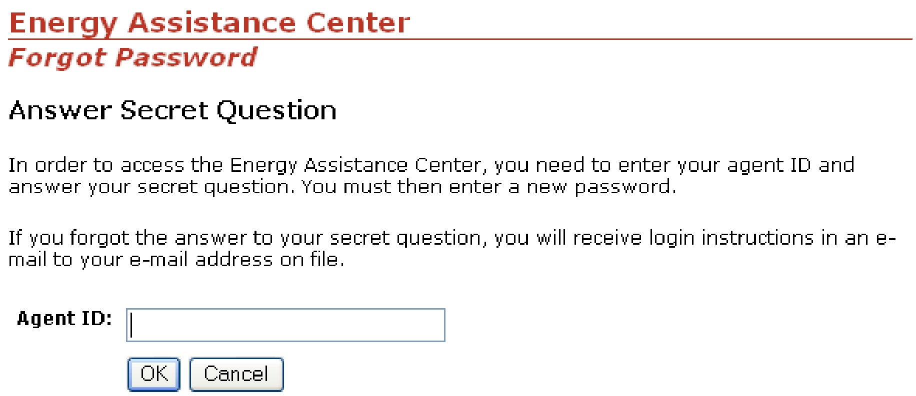


Figure 34. EAC Forgot Password Screen

2. Enter your Agent ID and click OK

Note: You must enter your Agent ID using upper case letters e.g. EA00999

The Answer Secret Question screen appears.

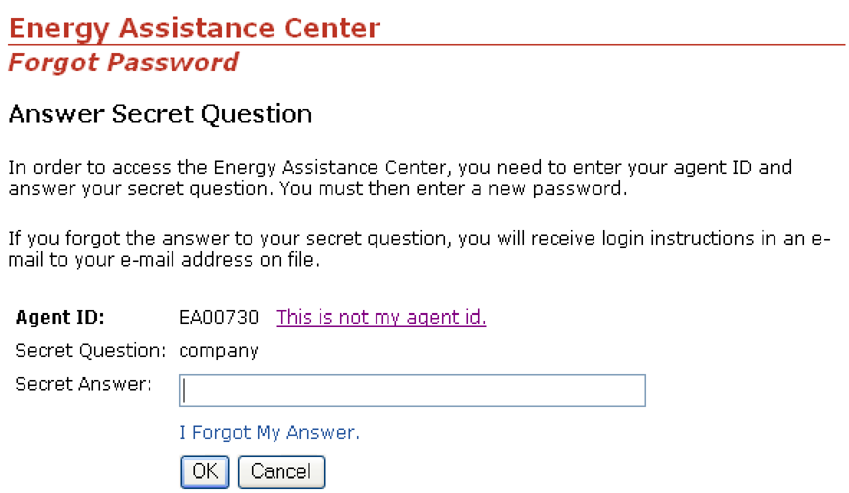


Figure 35. EAC Answer Secret Question Screen

3. Verify the Agent ID is you and enter your Secret Answer.

4. If the Agent ID is *not* you…click on the This is not my agent id. link to return to *Figure 34* so you can enter the correct Agent ID.

5. Click OK

The Reset Password Screen appears.

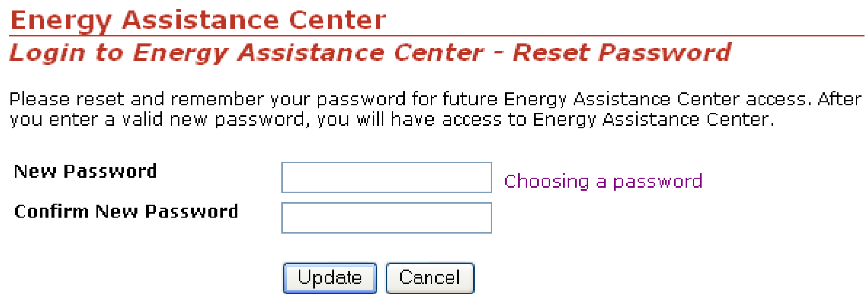


Figure 36. EAC Reset Password Screen

6. Enter a password following the password guidelines :

    - It must be between 6 and 15 characters.
    - It can't have any spaces.
    - The only acceptable punctuation or special characters are period, hyphen, underscore, apostrophe, and at sign (.-_'@).

7. Enter the password again to confirm and click Update

8. Your password is changed and the Agent Desktop screen will display.

Forgot Secret Answer

9. If an agent forgets their Password *and* their Secret Answer, click on the I Forgot My Answer. link (see *Figure 35*)

    This message screen will display and a temporary password will be sent to the e-mail address on file for their Agent ID.

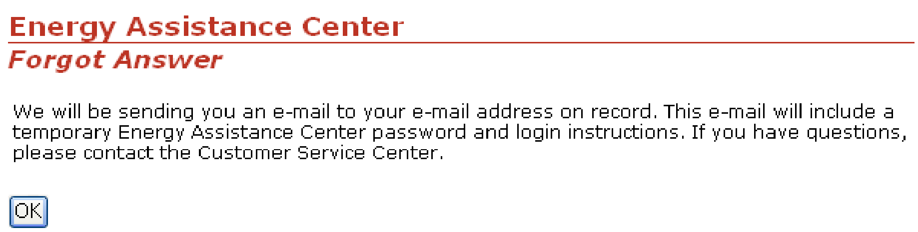


Figure 37. EAC Forgot Secret Answer Message

Scenarios

Overview

The EAC website provides you with tools and information to handle many of your questions when working with a client. Use it to:

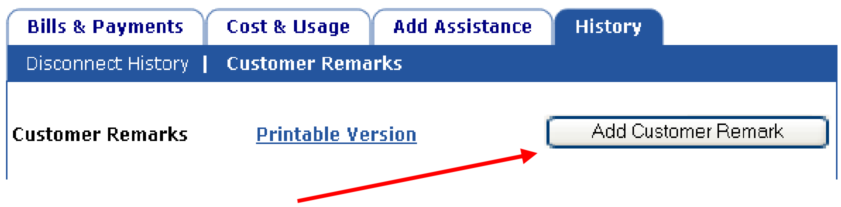
- View 18 months of Bills & Payment History
- Pledge funds to Alliant Energy
- Pledge customer co-payments to Alliant Energy and track customers payments
- Send defined notes to Alliant Energy (e.g. Application in Progress, LIHEAP Approved)
- Determine if a customer has defaulted on a utility payment agreement
- Print screens of payments, assistance pledged, cost & usage or notes for your records
- Customer is enrolled on the CA+ program.

Scenario 1: You want to check the status of a customers account. The website allows you to view the client's CA+ status.

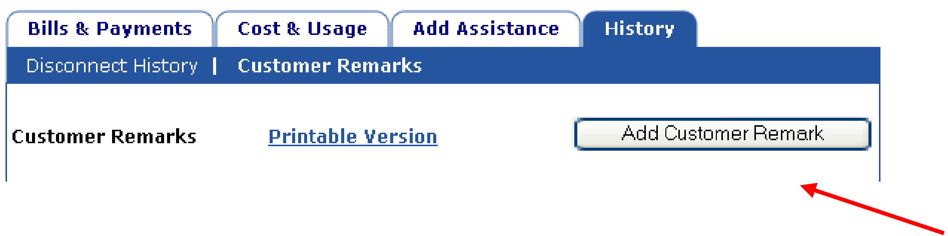
Note: This field is cleared out once a year at the beginning of November.

Scenario 2: A customer has applied for LIHEAP and you want to notify Alliant Energy and let them know the customer has been approved or is over income for LIHEAP.

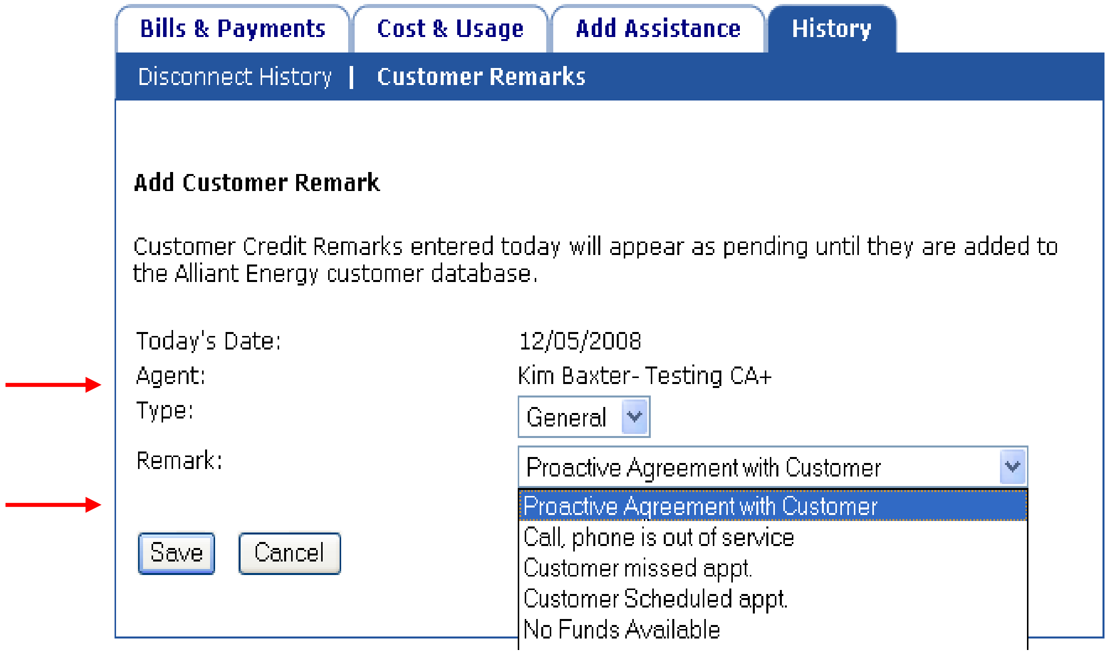
Use the Customer Remarks tool found on the History tab to make notes.



On the remarks screen, click on the Add Customer Remark button



- Select Type of General
- Select Remark that best fits, such as “Application in Progress”
- Click “Save” to add the note to the review screen
- If you receive a pop-up when this is added to your desktop, click “YES”


Bills & Payments
Cost & Usage
Add Assistance
History
Disconnect History | Customer Remarks
Add Customer Remark
Customer Credit Remarks entered today will appear as pending until they are added to the Alliant Energy customer database.
Today's Date: 12/05/2008
Agent: Kim Baxter- Testing CA+
Type: General
Remark: Proactive Agreement with Customer
Proactive Agreement with Customer
Call, phone is out of service
Customer missed appt.
Customer Scheduled appt.
No Funds Available
Save
Cancel

Scenario 3: A customer qualifies for additional funds and you want to notify Alliant Energy.

You can easily notify Alliant Energy of additional funds and notes will automatically be added to their utility account. It is not necessary to call *unless* a disconnect order is scheduled for today.

Any information on a disconnect order is displayed on the Bills & Payments tab (for example, see *Figure 11*).

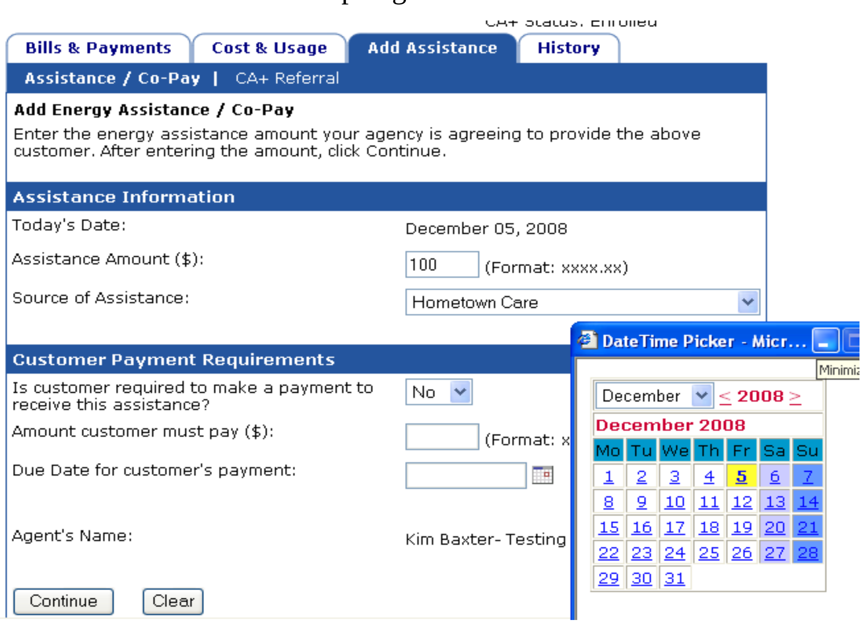
Add the additional funding information on the Add Assistance tab.

- Enter dollar amount to be paid by the Agency
- Select the source of funds from the drop-down box
- If the customer is not required to pay anything to get the funds, select NO.
    - If the customer is required to pay something select YES and complete the remaining fields

---

Note: If the customer has a disconnect notice, you will not be able to set the co-pay due date for the customer later than the disconnect date.

- Click Continue to review the pledge



- Click "Add Assistance" on the review screen to complete the pledge

Scenario 4: You need a copy of the customer's Bill & Payment History or Cost & Usage information.

Use the Printable Version link to load a perfectly formatted screen for you to print the information displayed on your screen.

Scenario 5: You need to call Alliant Energy to discuss a Payment Arrangement.

If you are working with a customer situation where you need to call Alliant Energy, you need to be sure you have obtained authorization from the customer whose name is on the account before you call. Because of Alliant Energy's privacy policy, we are unable to share information unless permission has been given by the person who has their name on the utility account. Permission may be obtained in one of three ways:

- A signed LIHEAP application
- Alliant Energy approved verbal authorization
- Alliant Energy approved signed authorization

To make things as quick as possible when you call, be prepared to tell us the following:

- Your Name and Agency Name
- Name of Customer you are calling about and that you have their permission to discuss the account
- The Customer's utility account number

Appendix

Example of Verbal Customer Authorization Form

This is available on the Common Links page

Energy Assistance Center

A Service of ALLIANT ENERGY

ENERGY ASSISTANCE CENTER/CA+ PROGRAM
RECEIPT OF VERBAL CUSTOMER AUTHORIZATION

CUSTOMER INFORMATION			
Customer Name(s) *(as it appears on the utility bill)*			
Wisconsin Power and Light Company Account Number(s)			
______________ - ________	______________ - ________		
______________ - ________	______________ - ________		
Customer's Address	City	State	Zip

RECEIPT OF VERBAL CUSTOMER AUTHORIZATION

I certify that on this date shown, I requested of ______________________ *(Customer Name)* that he/she authorize ______________________ *(Agency Name)* to obtain additional information from his/her energy supplier, Wisconsin Power and Light Company, from the records maintained by the energy supplier and to disclose such information to the CA+ Program Staff at Energy Services, Inc., or its successor. I explained that ______________________ *(Agency Name)* would obtain information about the customer's account(s) including household energy use, payment history, and other relevant account information for the purpose of assisting with energy assistance services.

Date Authorization Was Obtained	Name of Employee Obtaining Authorization	Signature of Employee Obtaining Authorization

CUSTOMER AUTHORIZATION SCRIPT

The following language or language substantially similar must be read to the customer or their legal representative for authorization.

"Please listen to the following statement and when I am finished, please respond with a Yes/No answer. You may refuse the following statement by saying NO, but such refusal may limit your ability to obtain energy assistance services. You may terminate this agreement at any time by calling this agency at

(________) ______________________ *(Agency Phone Number)*.

Do you authorize ______________________ *(Agency Name)* to obtain additional information from your energy supplier, Wisconsin Power and Light Company, about your account(s) including your household energy use, payment history and other relevant account information, for the purpose of assisting with energy assistance services? Do you authorize ______________________ *(Agency Name)* to disclose such information to the CA+ Program staff at Energy Services, Inc. or its successor?" ☐ Yes ☐ No

[illegible]

Example of Customer Authorization Form to be signed by the customer

This is found on the Common Links page.

Energy Assistance Center
A Service of ALLIANT ENERGY

ENERGY ASSISTANCE CENTER/CA+ PROGRAM
CUSTOMER AUTHORIZATION FOR
ACCESS TO ACCOUNT INFORMATION

CUSTOMER INFORMATION

Customer Name(s) *(as it appears on the utility bill)*

Wisconsin Power and Light Company Account Number(s)

Customer Address

City | State | Zip

CUSTOMER AUTHORIZATION

I hereby authorize ______________________________
(Agency Name)

to obtain information from my energy supplier, Wisconsin Power and Light Company, about my account(s) including household energy use, payment history, and other relevant account information, and, in the event that I am deemed eligible for referral to the CA+ Program, to disclose such information to the CA+ Program staff at Energy Services, Inc., or its successor, for the purpose of assisting with energy assistance services. I understand that I may terminate this agreement at any time by calling

this agency at (__________) ______________________.
(Agency Phone Number)

I understand that I may refuse to allow access to my account information, but such refusal may limit my ability to obtain energy assistance services.

Customer Signature | Date

AGENCY NOTES

FM-0405 02/05

Example of request form to add a new user to the EAC website for your Agency

This is found on the Common Links page.

Energy Assistance Center

A Service of ALLIANT ENERGY

ENERGY ASSISTANCE CENTER USER AGREEMENT

AGENCY INFORMATION		
Agency Name		
Address		
City	State	Zip

AGENT INFORMATION	
Name of Individual Requesting Access to Customer's Account	Job Title
Phone No. ( )	E-mail Address
Are you a full-time or part-time employee of the Agency? ❐ Full-time ❐ Part-time	

FOR OFFICE USE ONLY		
Agency has signed agreement: ❐ Yes ❐ No	Username	Temporary Password

AGENT AUTHORIZATION	
I am an Energy Assistance Agency agent within the Interstate Power and Light Company service territory authorized to issue energy assistance to Alliant Energy customers. I will view only accounts I am authorized to view. I will use this for official energy assistance purposes only. I am aware that my usage may be monitored to ensure compliance with Alliant Energy's legal and privacy polices.	
Signature of Agent Requesting Access	Date
Signature of Supervisor	Date

(See Copyright & Legal Notice, and Privacy Policy)

FM-0402-A 07/06

Energy Assistance Center Contact Information

For Customer Service questions about particular accounts that cannot be answered from the website Contact Alliant Energy Customer Service Center agents by e-mailing customercare@alliantenergy.com

For questions about the website send an e-mail to

energyassistance@alliantenergy.com

Version History

Version Number	Names	Date	Comments
1.0	Kim Baxter	01/25/2009	